

Using Rating Integration – SEMCAT

***NOTE:** The rating software must be installed on your workstation and setup in Partner XE prior to completing these steps. If the software is installed but is not set up in Partner XE, please refer to FAQ: *How to set up Partner XE to integrate with SEMCAT*

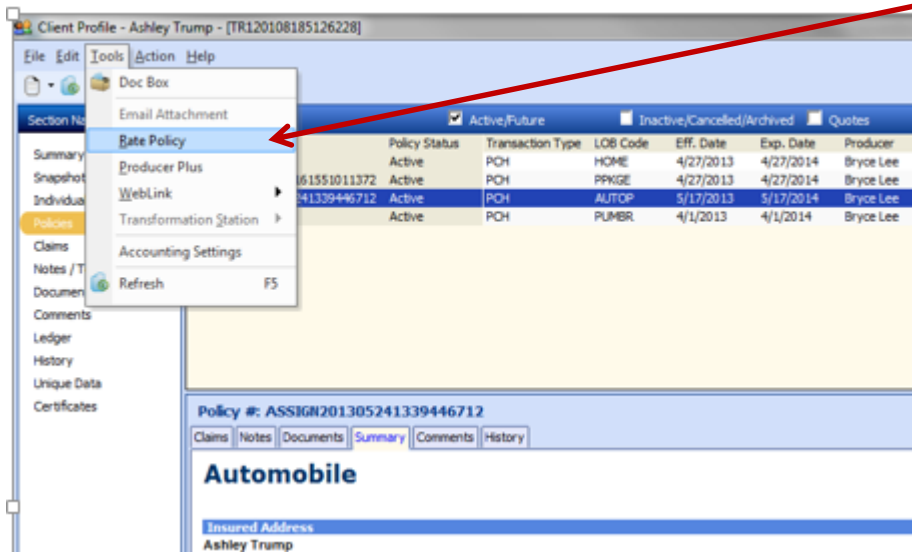
Partner XE to SEMCAT

1. Search for the policy you would like to rate from the Policies section of Partner XE.

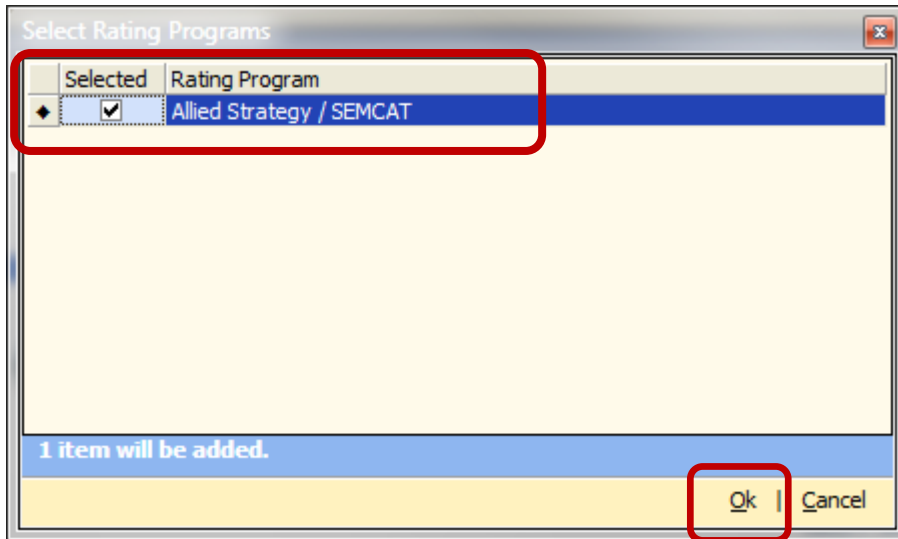
The screenshot shows the 'Policies' section of the Partner XE software. The main window displays a table of policies with columns for Sort Name, Client Name, Policy Number, LOB, Policy Status, Effective Date, Expiration Date, Policy Premium, Producer, CSR, and Company. A red box highlights the policy entry for 'Ashley Trump' with Policy Number 'ASSIGN201305241339446712'. A red arrow points to this entry. Below the table, there is a 'Pending Notes & To Do Lists' section and a 'Policies' section with a list of policies. The policy 'ASSIGN2013041615511112' is also highlighted with a red box. The interface includes a navigation menu on the left with options like 'My Quick List', 'System Search List', 'Calendar', 'Dashboard', 'Clients', 'Policies', 'Notes', 'Documents', 'Claims', 'Contacts', 'Individuals', and 'Reports'. The top of the window shows the 'Agency Desktop - SISAdmin Address test [218]' and various menu options like 'File', 'Edit', 'View', 'Accounting', 'Marketing', 'Tools', 'Action', 'Utilities', 'Communication', 'My Desktop', and 'Help'.

2. To open the Client Profile to the Policies section, click on the policy hyperlink in the Client Summary.

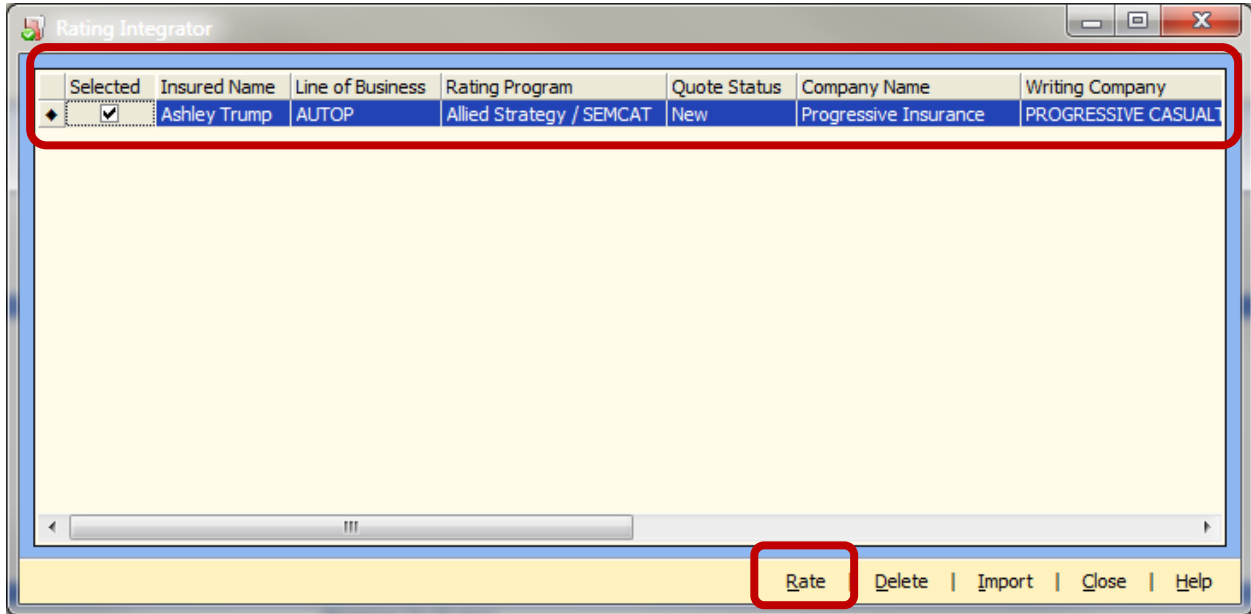
3. Highlight the policy you would like to rate and go to Tools then Rate Policy.



4. The Select Rating Programs window will appear. Check the box and Click OK.

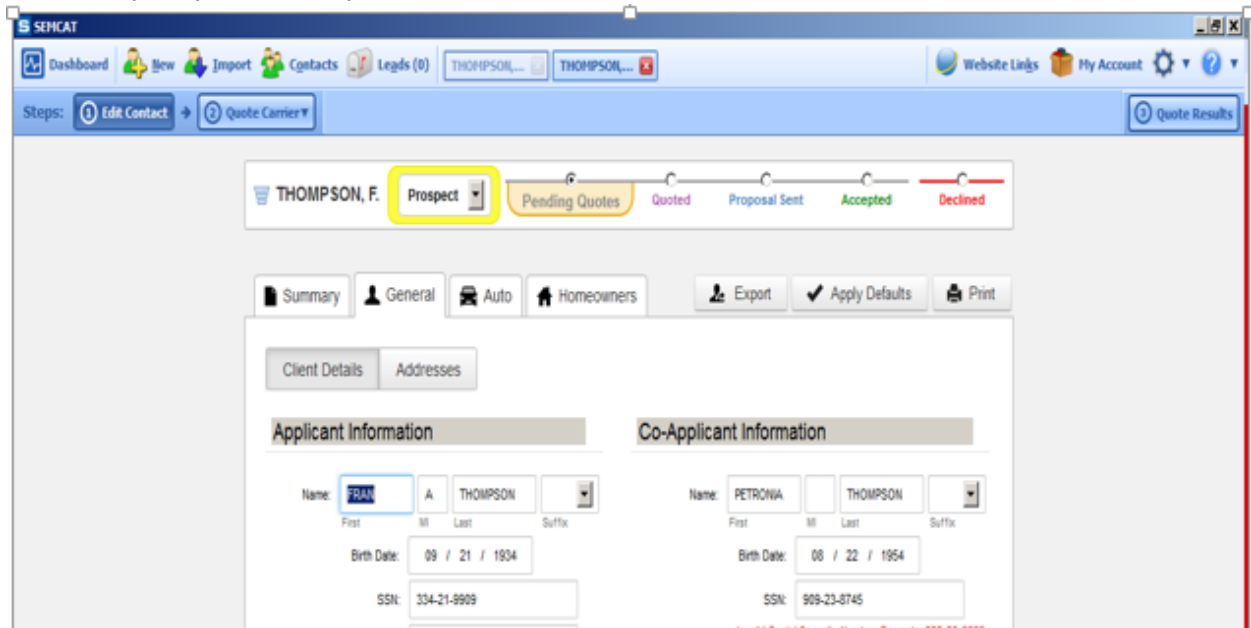


5. The Rating Integrator window will appear. Select one of the options listed and click on the Rate hyperlink at the bottom of the screen.



6. The rating software will open as a web application and you will be prompted to sign in. If you do not know your username and / or password, you will want to contact the software provider.

7. Your policy will be imported from Partner XE into SEMCAT.



8. Follow the normal procedure to retrieve your results within SEMCAT.